Taxpayer Access Point Frequently Asked Questions

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FREQUENTLY ASKED QUESTIONS ABOUT TAP

Who can use TAP?

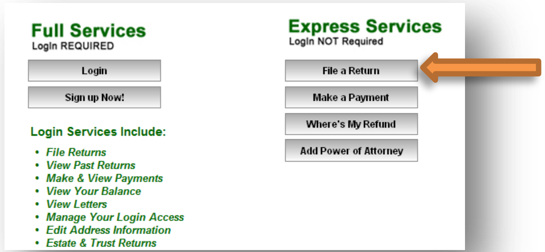
Businesses, individuals, and representatives such as accountants, bookkeepers, and payroll professionals can all use TAP to manage their Montana tax accounts.

- Individuals - If you have filed a Montana Individual Income Tax Return within the last 5 years, you can create a login to access your account information in TAP. If you have not filed a Montana Individual Income Tax Return within the last 5 years, you can still use MT Direct File to file your return. MT Direct File does not require a login and is available to non-residents, part year residents, or full year residents.
- Businesses - A business that has a Montana Tax Account ID or has already filed a return with the Department of Revenue can sign up for access to their accounts. If you are a new business in Montana with wage withholding, mineral wage withholding, lodging facility tax or rental vehicle tax and need to register your business with the Department of Revenue to file reports, you may complete and file a registration form on TAP by selecting Request Account ID**.**
- Representatives - Authorized representatives can access and manage tax accounts for their clients.

Benefits of using TAP

- It's Free! – There is no cost to use TAP.
- Convenient – Access TAP where and when you want – 24 hours a day, seven days a week. You won't wait in lines or on the phone.
- Simple – sign up for access the first time you use TAP.
- Secure – TAP protects your tax information and provides you with a secure online experience. Your self-created ID and password verify your identity and allow you to securely do business with the government online.
- Environmentally friendly – you can choose to stop receiving paper returns and manage your taxes online instead.
- Fast – TAP is the fastest way to get your refund. You can also see any payments and changes you make to your account within 24 hours.

EXPRESS SERVICES - FILE AN INDIVIDUAL TAX RETURN



Who can use MT Direct File?

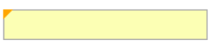
Individuals or representatives filing a Montana Individual Income Tax return for their clients. It is available to Montana residents, part-year residents or nonresidents. Filers must have a US mailing address to file using MT Direct File. This is the best option for New Residents or first time filers.

Is there a cost to use MT Direct File?

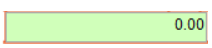
No. Using TAP is a free service of the Montana Department of Revenue.

What do the different colors mean?

- Yellow – information is required



- Green – field is optional



- Red – field has incorrect or insufficient information

- White – field cannot be edited. It may be an auto-calculated field. If you are accessing a saved return and all the fields are white select the Change on the left side of the screen to complete your return.

- Errors may be yellow or red. Red is incorrect information in a field. Yellow is required information that must be entered to continue.
- All yellow and red errors must be corrected before you may submit a return.
- All boxes with errors, whether yellow or red, will also have a triangle in the upper left hand corner of the box.

I saved my return to finish later, how do I get back to my return?

Go to TAP and follow these steps:

1. Select Individual
2. Under Express Services, select File a Return
3. On the right side of the screen select Retrieve a Saved Return
4. Enter your email address and the 6 digit alphanumeric retrieval code emailed to you at the time you saved your return
5. Select Search

If your return is incomplete (has not been submitted), remember to select Change to continue.

I have saved or submitted my return, but forgot to write down my retrieval code. Can I still access my return?

Check your email inbox, we have sent your retrieval code to you for future reference. The email is coming from DoNotReply@mt.gov. You may need to check your junk folder. If you need further assistance retrieving a saved return you can contact us.

I'm unable to change information on my return, what do I do?

If you have not submitted the return, select Change on the left of the screen to update the return.
If you have submitted your return and need to make changes, an amended return is required by paper. Paper forms can be found in our downloadable forms.

After submitting my return, can I go back and print it?

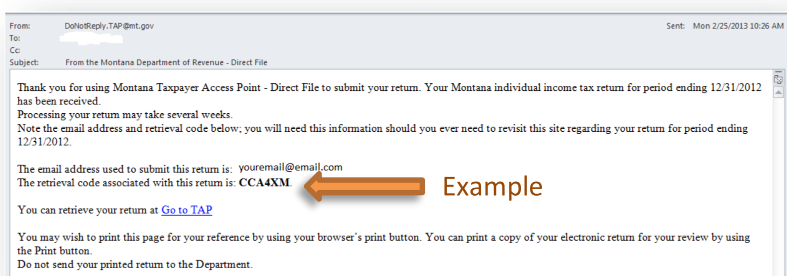
Yes, you may. Go to TAP & follow these steps:

1. Select Individual
2. Under Express Services, select File a Return
3. On the right side of the screen select Retrieve a Saved Return
4. Enter your email address and the 6 digit alphanumeric retrieval code
5. Select Search
6. Select the Print located on the left side of the screen

I've submitted an individual income tax return through MT Direct File, how can I tell if it has processed or what the status is?

Go to TAP & follow these steps:

1. Select Individual
2. Under Express Services, select File a Return
3. On the right side of the screen select Retrieve a Saved Return
4. Enter your email address and the 6 digit alphanumeric retrieval code emailed to you at the time you saved your return



From: DoNotReply.TAP@mt.gov
Sent: Mon 2/25/2013 10:26 AM
To:
Cc:
Subject: From the Montana Department of Revenue - Direct File

Thank you for using Montana Taxpayer Access Point - Direct File to submit your return. Your Montana individual income tax return for period ending 12/31/2012 has been received.
Processing your return may take several weeks.
Note the email address and retrieval code below; you will need this information should you ever need to revisit this site regarding your return for period ending 12/31/2012.

The email address used to submit this return is: youremail@email.com
The retrieval code associated with this return is: **CCA4XM**.

You can retrieve your return at Go to TAP

You may wish to print this page for your reference by using your browser's print button. You can print a copy of your electronic return for your review by using the Print button.
Do not send your printed return to the Department.

5. Select Search

At the top of the screen you will see the status of the return:

- Stored – indicates that you have saved the return to complete later. To continue your return, select the Change on the left side of the screen.
- Pending - indicates that you have submitted the return and it has not loaded to our main tax system. Changes can be made until 5 pm on the day that you submitted the return.
- Complete – The return has been loaded to our main tax system. If changes need to be made, an amended return is required.

I have submitted my return, but realized I made an error. How can I fix it?

If the status of your return is pending, you may select Change on the left side of the screen.

If you have submitted the return and the status is Complete, an amended return is required. Paper forms can be found in our downloadable forms.

WHERE'S MY REFUND?

I have submitted my return, how do I check my refund?

Go to TAP & follow these steps:

1. Select Individual
2. Under Express Services, select "Where's My Refund"
3. Enter your Social Security Number (SSN) and the amount you are expecting as a refund
4. You will see your status as your refund moves through our processing system

MANAGE YOUR TAX ACCOUNT USING TAP FULL SERVICES (LOGIN REQUIRED)

- File or amend tax returns or submit license renewals
- Make tax payments (including scheduling payments for future dates)
- View your account history – previously filed returns and previously submitted payments
- Update account information such as an address or name change
- Grant your account representative (accountant, bookkeeper, or other professional) third party access to use TAP on your behalf
- Access all your tax accounts under a single login

Which taxes, fees, and licenses can I access online using TAP?

Agency Liquor Store (LIQ)	Electrical Energy Tax (EEL)	Other Tobacco Products (OTP)
Bad Debts (BDT)	Fiduciary-Estates and Trusts (FID)	Partnership (PTR)
Beer Connoisseur Tax (BCT)	Foreign Brewery Import License (FBI)	Public Service Regulation Fee (PSR)
Beer Tax (BET)	Foreign Winery Import License (FWI)	Rental Vehicle Tax (RVT)
Bentonite (BEN)	Hard Cider (HCT)	Resource Indemnity Tax (RIT)
Brewery Storage Depot (BSD)	Hospital Facility Utilization Fee (HUF)	Retail Telecommunications Excise Tax (RTE)
Cement and Gypsum (CGT)	Individual Income Tax (IIT)	Small Business Corp (SBC)
Cigarette Tax (CIG)	Liquor Shipper (TRK)	Telephone Device for the Deaf (TDD)
Coal Gross Proceeds (CGP)	Liquor Vendor Acct (LVA)	Vendor Representative License (VRL)
Coal Severance Tax (CST)	Lodging Facility Sales & Use (LFT, LST)	Wholesale Energy Trans Tax (WET)
Common Carrier Tax (LCT)	Metal Mines Gross Proceeds (MMG)	Wholesale License (WSL)
Connoisseur License (CON)	Metalliferous Mines License Tax (MML)	Wine Connoisseur Tax (WCT)
Consumer Counsel Fee (CCT)	Mineral Royalty (MRW)	Wine Tax (WIT)
Corporate License Tax (CLT)	Misc Mines Net Proceeds (MMN)	Withholding Tax (WTH)
Distilled Spirits Mfr License (DSM)	Nursing Facility Utilization Fee (NFB)	911 Emergency Telephone Fee (911)
Domestic Brewery License (DBR)	Oil and Gas Production Tax (COG)	
Domestic Winery License (DWR)	On-Premises License (ONP)	

Is there a cost to use TAP?

No. Using TAP is a free service of the Montana Department of Revenue.

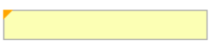
What information do I need to sign up for account access in TAP?

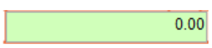
You must be a customer in our tax system (have a Montana Tax Account ID or have filed a previous return) and have a valid email address to sign up for TAP access. You will also need the following information.

- Individual Income Tax
    - Social Security Number
    - Federal Adjusted Gross Income (Fed AGI) from your last return filed in Montana. If you only filed a Form 2EC last year, you may use the total gross household income from Form 2EC Line 1. You must have filed a return within the last 5 years to gain access to login to your Montana TAP account.
- Business Income Tax, Miscellaneous Taxes or Liquor Accounts
    - Montana Tax Account ID assigned by the Department of Revenue when an account is created. This 13-digit alphanumeric ID is formatted as 123456-789-XXX. If you do not know your Montana Tax Account ID, please contact us.
- Wage Withholding
    - The 13 digit Montana Tax Account ID
    - Zip code
    - Federal Identification Number (FEIN)
    - Instead of your FEIN, you may use the last payment amount or total wages paid subject to withholding from your most recent Form MW-3.

What do the different colors mean?

- Yellow – information is required

  
- Green – field is optional

- Red – field has incorrect or insufficient information

- White – field cannot be edited. It may be an auto-calculated field. If you are accessing a saved return and all the fields are white select Change on the left side of the screen to complete your return.

- Errors may be yellow or red. Red is incorrect information in a field. Yellow is required information that must be entered to continue.
- All yellow and red errors must be corrected before you may submit a return.
- All boxes with errors, whether yellow or red, will also have a triangle in the upper left hand corner of the box.

LOGINS AND PASSWORDS

How do I sign up for account access?

Follow these steps to sign up for TAP:

1. Select a button on the TAP web page that indicates which tax account you want to access. (Individual, Business or Liquor)
2. Choose Sign up Now!
3. Enter the required information and select Submit.

Within 5-10 minutes you will receive an authorization code and you may login to your account.

I signed up for TAP access but have not received an authorization code yet. Where is it?

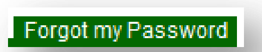
The authorization code will come from DoNotReply.TAP@mt.gov. Some internet providers and spam filters may stop certain emails. Ensure you set these filters to allow an email from DoNotReply.TAP@mt.gov. If you are unable to locate the email, please contact us for further assistance.

Do I need to enter my authorization code each time I log in to TAP?

No. You only need the authorization code the first time you login or if you use the Forgot my Password feature.

I forgot my password. How do I access my account?

If you have forgotten your password, please use the Forgot My Password feature. The button is located in the top right hand corner of the login screen. You will need your username and answer to your secret question. A new authorization code will be emailed to you to use at login.



I forgot my password and followed the steps but have not received an authorization code yet. Where is it?

The authorization code will come from DoNotReply.TAP@mt.gov. Some internet providers and spam filters may stop certain emails. Ensure you set these filters to allow an email from DoNotReply.TAP@mt.gov. If you are unable to locate the email, please contact us for further assistance.

I have multiple tax accounts. Can I access all of them in TAP?

Yes. Once you have signed up for TAP access, you can add access to any tax account that is part of the TAP system. Follow these steps to add access to your other tax accounts.

1. Select Add Access to Another Account located on the left side of the screen.
2. Enter verification information for each account:
   - Individual Income Tax – Your social security number and Federal Adjusted Gross Income (Fed AGI) from your last filed return in Montana. If you only filed a 2EC last year, you may use the total gross household income from Form 2EC line 1. You must have filed a return within the last 5 years to gain access to your Montana TAP account.
   - Business Income Tax, Miscellaneous or Liquor accounts – the 13 digit alphanumeric Montana Tax Account ID. Formatted as 123456-789-XXX.
   - Wage Withholding – the 13 digit Montana Tax Account ID, zip code, and last payment amount or total wages paid subject to withholding from your most recent form MW-3 or your FEIN.
3. Select Submit
4. After submitting the access request, select My Accounts under Navigation on the left hand side of screen. The new account will appear in your Account list.

I'm worried that my password has been compromised. What should I do?

You can change your password at any time by following these steps:

1. Login to your account
2. Select View My Profile
3. Select Change Password
4. Follow instructions to set a new password

I no longer want access to my accounts in TAP. How do I cancel my access?

You can cancel your TAP access at any time by following these steps:

1. Login to TAP
2. Select View My Profile
3. Select Cancel My Online Access
4. Enter your password
5. Select OK

If you decide later that you want to access your accounts in TAP, you must sign up for TAP access again with a new Login ID. Login IDs cannot be re-used.

FILING AND VIEWING RETURNS

How do I file a return?

Follow these steps to file a return:

1. Login to your TAP account, select Account ID from your Home Page
2. Under the Periods tab, select the All Periods tab
3. Select File Now (or List of Returns to File or View) next to the period you wish to file

I've completed all my information on the return. The step still says Needs Correction. How do I find my errors?

- Errors may be yellow or red. Red is incorrect information in a field. Yellow is required information that must be entered to continue
- All yellow and red errors must be corrected before you may submit a return
- All boxes with errors, whether yellow or red, will also have a triangle in the upper left hand corner of the box

Where do I find a previously filed return?

Follow these steps to find a previously filed return:

1. Login to your TAP account, from your Home Page, select the Account ID
2. Under the Periods tab, select All Periods tab
3. Select View Returns (or List of Returns to File or View) next to the period you wish to view

What if the year I need to file is not listed?

If the year you wish to file is not listed in the All Periods tab, you must file a paper return. Paper forms can be found in our downloadable forms.

Can I save my return and finish it later?

Follow these steps to save a return and finish it later:

1. Select the Save and Finish Later button on the left side of the screen.
2. Enter your password and Select OK.
3. A Confirmation screen will appear.

When you return to TAP, follow these steps to change your return:

1. Log in to TAP.
2. In the My Accounts tab, click on the blue Id link.
3. Go to the Periods tab.

4. In the All Periods tab, click on List of Returns to File or View for the period you want to change.
5. Click on View Request.
6. Click on Change in the left hand column to make changes.
7. When you are finished, click on Submit in the left hand column to submit your final return.

How do I change my saved return?

1. Login to TAP.
2. In the My Accounts tab, click on the blue Id link.
3. Go to the Periods tab.
4. In the All Periods tab, click on List of Returns to File or View for the period you want to change.
5. Click on View Request.
6. Click on Change in the left hand column to make changes.
7. When you are finished, click on Submit in the left hand column to submit your final return.

I have submitted a return in TAP. How can I tell if it has been processed or find its status?

Go into the account and select the Requests tab. From the Request screen select the Search tab. If the status says:

- Stored – you have not submitted the return to be processed. Select the title link, and then select Change on the left side of your screen. From here you can complete your return and select Submit to file your return with MT Department of Revenue.
- Pending – The return is waiting to be loaded to our main tax system. The upload occurs at 5pm each day. A return can be withdrawn or changed if the status is Pending.
- Complete – The return has been loaded to our main tax system. If changes need to be made, an amended return is required.

How do I amend a previously filed return?

Individual Income Tax Returns cannot be amended through TAP, a paper return is required. Paper forms can be found in our downloadable forms.

The following returns can be amended through TAP; all others must be amended by filing a paper return. Paper forms can be found in our downloadable forms.

- 911 Emergency Telephone Fee (911)
- Beer Tax (BET)
- Consumer Counsel Fee (CCT)
- Hospital Facility Utilization Fee (HUF)
- Lodging Facility Sales and Use (LFT)
- Public Service Regulation Fee (PSR)
- Rental Vehicle Tax (RVT)
- Retail Telecommunications Excise Tax (RTE)
- Telephone Device for the Deaf (TDD)
- Wholesale Energy Trans Tax (WET)
- Wine Tax (WIT)

I submitted my return, but realized I made a mistake. Can I correct it?

Submitted returns can be changed until 5pm on the day of submission.

To make changes to a submitted return within the time limit, follow these steps:

1. Login to TAP
2. Select Account ID from your Home Page
3. Select View Request for the return you need to update
4. Select Change to the left side of your screen

If you were unable to make your change prior to that time, an amended return is required to be filed by paper. Paper forms can be found in our downloadable forms.

PAYMENTS

How do I make tax payments using TAP?

Follow these steps to make a tax payment:

1. Once you are logged into your TAP account, select Account ID from your Home Page.
2. On the left side of the screen select Make a Payment
3. If you want to pay for an outstanding balance on your account, select Pay Account Balance from the left side of the screen

Can I make an e-Check or ACH Debit payment?

Yes, you can by entering your bank routing and account number after selecting the e-check option for a payment. (No fee)

Can I make a payment by credit card using TAP?

Yes. We accept Visa or Master Card. Debit and Credit Card are subject to a fee charged by the processor service.

I can't find the period end date that I need to pay for. What do I need to do?

Use Make a Payment on the left side of the screen. It will display prior and future period end dates. If you are still unable to locate the period end date you want to pay for, contact us for further assistance.

CHOOSE PERIOD TO PAY TAX FOR	
Submit payment for 31-Dec-2013	0.00
Submit payment for 31-Dec-2012	0.00
Submit payment for 31-Dec-2011	0.00
Submit payment for 31-Dec-2010	382.34

I have tax due on my return but cannot pay it in full by the due date. Can I make a payment arrangement?

Payment arrangements can be requested by submitting Form ARC-1 (Request for a Payment Plan) by mail.

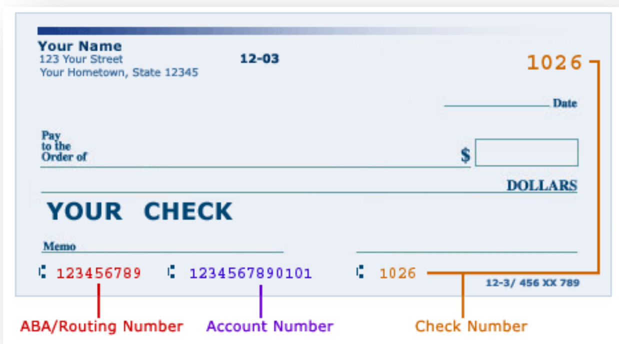
I made an error entering my payment information. How do I fix it?

If you made an e-check or ACH debit payment you have until 5 pm on the payment date to correct it. You must cancel the e-payment and re-enter a correct payment. To cancel a payment:

1. Go to the Requests tab
2. Select the payment you wish to change
3. Select the Withdraw on the left side of the screen
4. Select Confirm to complete the withdrawal
5. To enter a correct payment, go back to the Period tab & select Make a Payment or Pay

If you made a Debit or Credit Card payment, it cannot be canceled. The transaction is sent immediately to the banking institution. You may contact your bank institution for assistance.

How do I find my bank routing and account number?



What information will my bank need to process debit payment requests?

Some banks may need our payment authorization code: 3810302402

Can I save my bank information for future use?

Yes. You can save your banking information.

1. After logging into TAP, select View My Profile from your Home Screen
2. Under My Accounts tab, select Advanced Payment Options tab
3. Select Add New
4. Enter banking information
5. Multiple bank accounts may be saved, be sure to be update any changes and remove unused accounts

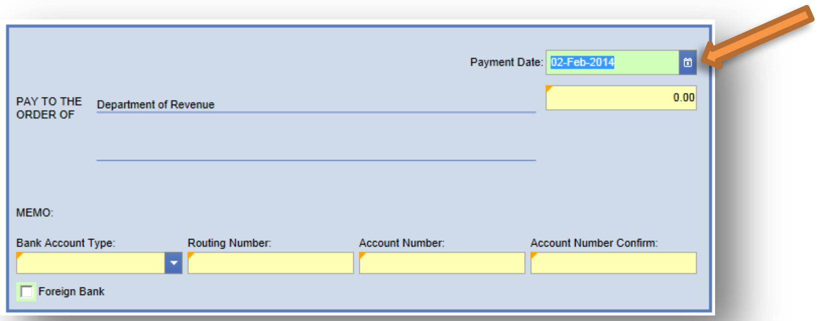
Can I change or delete bank information I have saved?

Yes. You can change or delete bank account information by completing the steps below:

1. After logging into TAP, select View My Profile from your Home Screen
2. Under My Accounts tab, select Advanced Payment Options tab
3. Select Bank Name
4. Choose Delete on left side of screen
5. Select Confirm on left side of screen

Can I submit a payment to process on a future date?

Yes, ACH Debits and e-checks can be scheduled for a future date. When submitting an ACH Debit or e-check, select a date in the future up to 365 days.



Will I get a confirmation number if I make a payment in TAP?

Yes. After you enter your password to submit a payment, a Confirmation screen will provide you with a confirmation number.

How long will it take for my payment to process?

Payments will usually post to your bank account within 3 to 5 business days.

Why do you ask about accounts outside the U.S.?

We are unable to accept payments from an account outside the U.S. at this time.

I have submitted a payment in TAP. How can I tell if it has been processed or find its status?

Go into the account and select the Requests tab. From the Request screen, select the Search tab. If the status says:

- Pending – The payment is waiting to be processed to our main tax system. The upload occurs at 5pm each day. A payment can be withdrawn or changed if the status is Pending.
- Complete – The payment has been processed.

How do I view my payment history?

After logging into TAP, choose the Activity tab from your Home Page. This will display your returns and payments.

THIRD PARTY ACCESS

What is third party access?

Third party access can be granted to an accountant, bookkeeper, tax preparer, or other professional that is conducting business on behalf of their client (tax account holder.) The tax account holder can grant different levels of access to their account. This access remains until the tax account holder removes or changes permission.

For more information on how to allow or not allow a representative third party access, please view the How do I allow or not allow a representative third party access.

Third party access options available in TAP

There are three levels of third party access a tax account holder can grant:

- Full access – edit name, address, file returns, submit payments and view previously filed returns and payments
- View– view previously filed returns and payment history
- View and File – view previously filed returns, view payment history, file returns, and submit payments

How do I permit third party access?

If someone is requesting access to your account, such as an accountant, you will receive an email stating who requested access. If you choose not to grant access, no action is required. If you choose to grant access, follow the steps below.

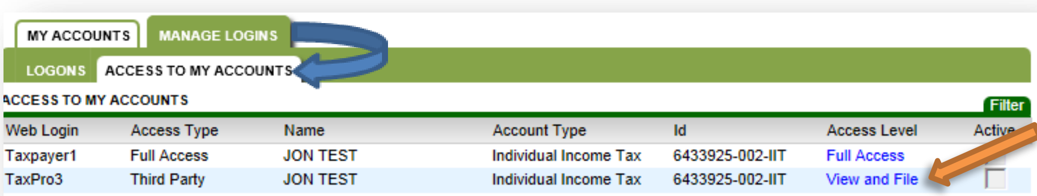
From the Home page of your TAP Account:

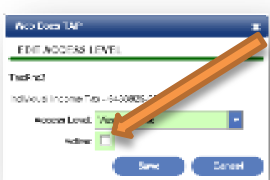
1. Select View My Profile
2. Select Manage Logins tab
3. Select Access to My Accounts tab
4. Select the link under the Access Level that pertains to the person who is requesting access Follow these steps:

a. Select the Access Level from the drop down box
   - Full access – edit name, address, file returns, submit payments and view previously filed returns and payments
   - View– view previously filed returns and payment history
   - View and File – view previously filed returns, view payment history, file returns, and submit payments

b. Check the Active box

c. Select Save



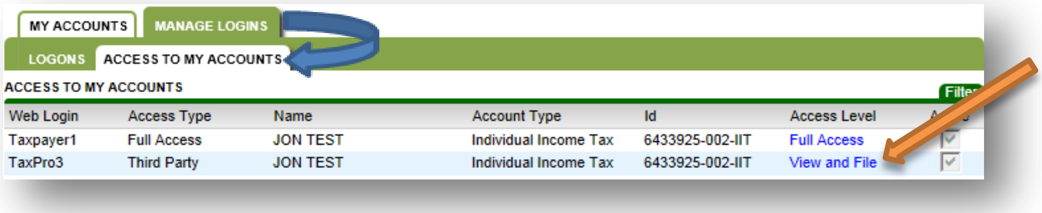


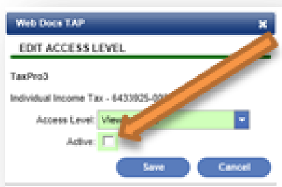
How do I cancel third party access?

From the Home page of your TAP Account, you can remove or change third party access levels as follows:

1. Select View My Profile

2. Select Manage Logins tab
3. Select Access to My Accounts tab
4. Select the link under the Access Level that pertains to the person who is requesting access.
5. Uncheck the Active box
6. Select Save





I'm a Tax Preparer representing clients. How do I sign up for TAP?

Follow these steps to sign up for TAP:

1. Select the Business button on the TAP web page
2. Choose the Sign up Now!
3. Follow the steps provided
   a. Reminder for Step 1, do not select an Account Type. Do Select yes for the *Are you a Professional Tax Preparer* and then enter your SSN or FEIN as requested

Within 5-10 minutes you will receive an authorization code by email and you may login to your account.

4. Login to TAP with your username, password~~,~~ and authorization code
5. Select Add Access to Another Account
6. Follow the steps provided to add client accounts

I'm a Tax Preparer, how do I access my client's account?

Your client must have TAP access to the account(s) before you can request access.   Follow these steps to request your access:

1. Login to TAP
2. Select Add Access To Another Account
3. Select the Account Type from the drop down box you wish to access at Step 1
4. Select Enter Account at Step 2
   - Individual Income Tax – Enter your client's Social Security Number and Federal Adjusted Gross Income (Fed AGI) from their last return filed in Montana. If he/she only filed a 2EC last year, use the total gross household income from their Form 2EC line 1. Your client must have filed a return within the last 5 years to gain access to their tax account in TAP.

- Business Income Tax, Miscellaneous Taxes, or Liquor Accounts – Enter your client's 13 digit alphanumeric Montana Tax Account ID, formatted as 123456-789-XXX.
- Wage Withholding – Enter your client's 13 digit Montana Tax Account ID, zip code, and either their FEIN, their last payment amount or their total wages paid subject to withholding from their most recent Form MW-3.

5. Select OK
6. Select Submit

An email will be sent to your client notifying them of your request to access their account(s). They must grant you access before you are able to view their account(s).

SYSTEM REQUIREMENTS/TROUBLESHOOTING

What are the operating system and browser requirements to use TAP?

Operating system: There are no requirements. All systems should work as long as they can run a browser.

Browser requirements:

Internet Explorer 7+
Firefox 3+
Opera 10+ (and possibly lower versions)
Safari 5+ (and possibly lower versions)
Chrome IOS 3+
Android 2.1+

I am trying to view/print a letter or return but the document is not displaying. What should I do?

There are a few things you will need to check:

1. You will need the current version of Adobe Reader to view and print your copy. If you do not already have the current version of Adobe Reader installed on your computer, you may download the software for free.
2. Your letter or return may open in a new window. Check to see if there is another open window containing your document.
3. You may also need to check your pop-up blockers. If you are not allowing pop ups from the TAP website, the document cannot be seen.
   a. To temporarily disable pop-up blockers, try holding the Ctrl key down while selecting the Print.
   b. To disable pop-up blockers with your browser:

      Internet Explorer: Menu Bar > Tools > Pop-Up Blocker > Turn Off Popup Blocker
      Fire Fox: Menu bar >Tools > Options. Choose the Content tab and uncheck *block pop-up* windows and select ok.
      Other internet browsers – use the help option.

CONTACT THE DEPARTMENT OF REVENUE FOR ASSISTANCE

Call our **Citizen Services Call Center** for assistance with your individual, nonresident, or business tax questions. Our hours of service are Monday through Friday, 8 a.m. to 5 p.m. (Mountain Time)

In Helena	406-444-6900
Outside of Helena	1-866-859-2254
Telephone Device for the Deaf-TDD	406-444-2830
After hours/weekends:	Citizen Services Email